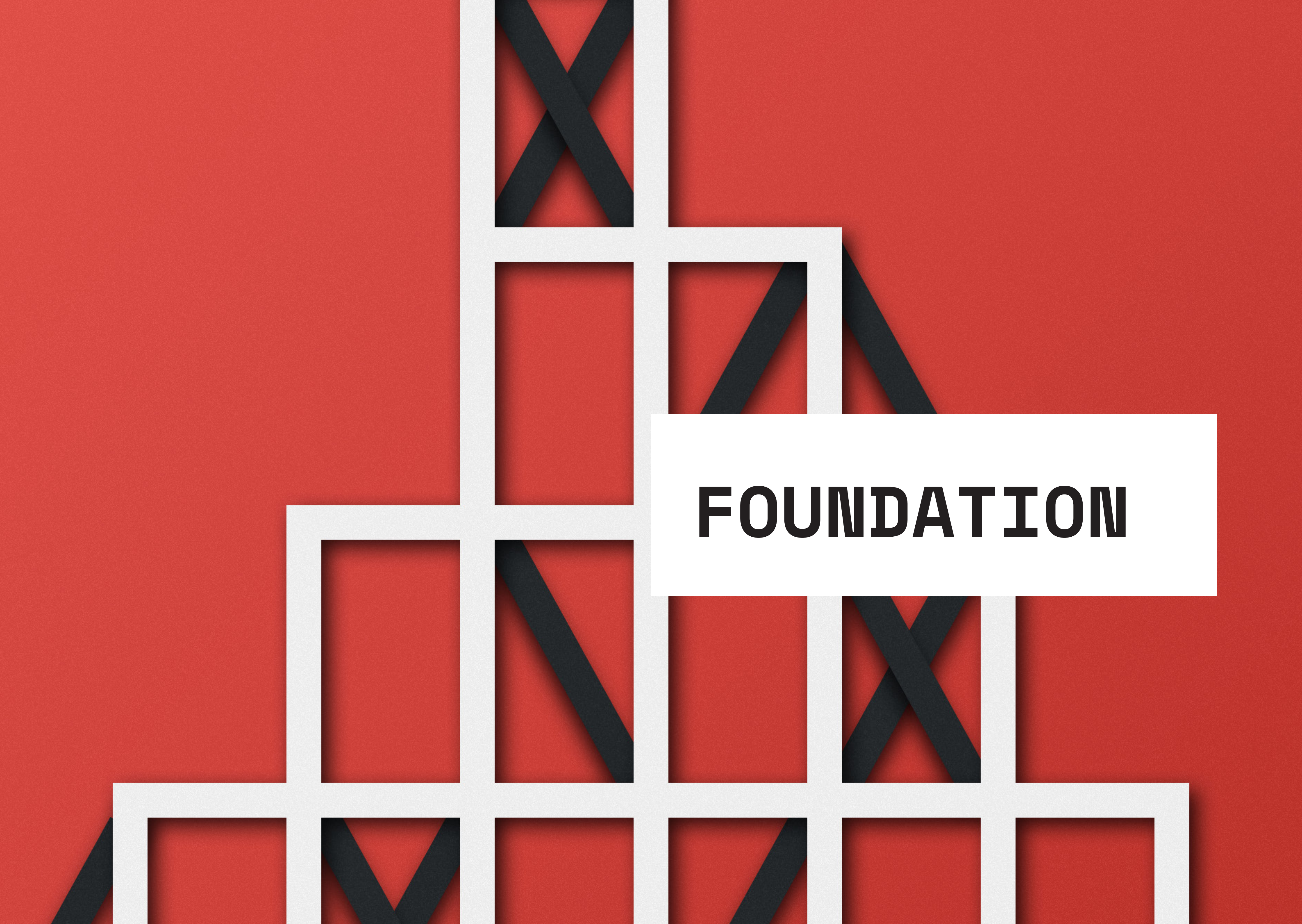
FOUNDATION



INTRO

Whether it's an addition to your project kickoff meeting or you combine it, the Foundation workshop will help you create a basis from which everything else can flow: how you work together, what kinds of interactions will build trust, and how to give voice to your hopes, fears, ideas and plans. You may want to use slide presentations, a flipchart or whiteboard, or just print the materials you need.

If you're working with a group of 3 or 5 people, it should take around 2 hours – which is what our time estimates are based on, but the larger your group is, the longer you should spend on the tasks. A group of 10, for example, or more should block out the better part of a day – just don't forget to take regular breaks. You can shortcut some of the items, and you should always be mindful of timeboxing, but it's important for everyone to get time to speak in the group.

Before you start, make sure you send the invitation to the team.

INVITATION TO YOUR TEAM

Dear Team,

As you know, part of our work on [name of project] will include some sessions that specifically focus on how we're doing as a team. These are part of our journey toward becoming a better team, which will make our work environment a more trusting and rewarding one.

We'll start with the Foundation session, which is the longest of these workshops. It's designed to bring clarity to roles, responsibilities, and expectations before we start, so we can avoid issues with those later on.

I'll bring the workshop materials and take us through the process. I've booked [X] hours in [Y location] and [add information about access to food and toilets!].

You don't need to prepare anything, but it is useful to think about:

- ☑ How to clarify your roles and responsibilities in the project
- ☑ What, if any, development goals do you have that could relate to it
- ☑ If you have any access or other needs (e.g., time restrictions, accessibility concerns)

Thanks, and see you at the [location].

[Your name]

You can copy and paste this email template

STEPS IN THIS SESSION

Time estimated:
3–5 participants = 2-3 hours

(The larger the group, the more time you need for each task.)

1 Check-In

10 min. The team takes a few moments to say hello and talk about where they are at this specific time. It might be just a hello, or it could flag a need to reprioritise. (13)

2 Introduce The Teamwork Kit to Your Team

10 min. Even if all the members have used it before, a refresher might be necessary. (14)

3 Work Group or Project History

20 min. The kit is designed for project teams, but it can be used in any group. If there isn't a specific project to be introduced, have the initiator of the process outline the background of your current work together. (16)

4 Goals and Deliverables

20 min. You probably know what the outcome of the project is supposed to be, or, if you're at Point A, what Point B or C looks like. But how will you get there? Often, we think this element is fairly clear, but this is always a good opportunity to lay out how we each see the path in front of us. (18)

5 The Team Template and Map

20 min. All the elements and methods together are valuable as a whole, but the Team Template is among the most valuable in its own right. The template helps everyone understand how each person fits in, the team map shows them exactly where. (20)

6 Work Culture

20 min. Now you'll start connecting the dots, connecting your work with your own values and those of the organisation. And you'll make some rules that address the needs of the team and its members. (26)

7 Plan Your Journey

20 min. What's ahead and how will you get there? By now, everyone has some plans, but also some concerns. The Stinky Fish exercise is a space to talk about the worries and issues we see in our way. Talk about those, then make the team routine together. (30)

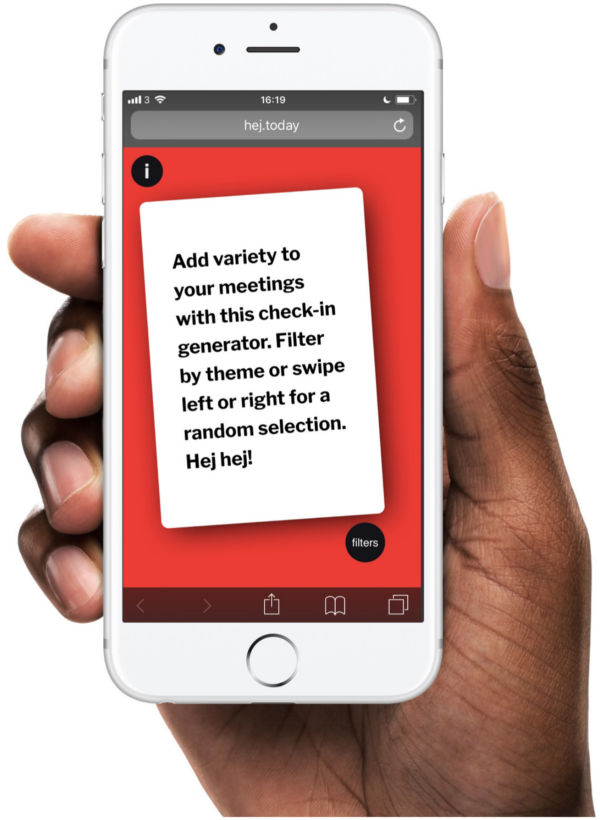
THE TEAMWORK KIT

1. Check-In

The check-in is a chance for the team to fully arrive, physically and mentally, and express their feelings and moods about the project work or the day ahead of them. This is where "I'm tired because my kid was up all night and I think I need some boring tasks to focus on" and "I feel happy because tomorrow is my birthday" are relevant. They might not be about the work, but they'll certainly affect the work. Don't skip this – making space for these small moments will help build trust incrementally.

What to do

- If they're used to doing check-ins, just ask "Who wants to start?", but if they're still new to them, offer your own, or ask someone who is usually eager to speak up if they'd be willing to start.
- If participants aren't comfortable offering information without a prompt, set a theme or ask a specific question. Otherwise, just let them decide.
- If your team isn't used to checking in, start with one yourself, to help team members distinguish between this and a stand-up.
- Try using a timer. Add 60–90 seconds for each person, which should be more than enough, and will help participants prioritise what's most important for their colleagues to know about.
- If anyone has shared something that indicates they need help prioritising or they need a different focus for the next while than what was planned, note that and talk about it during the "priorities and actions" section of the workshop, or privately, afterward.



Try the Check-in generator

2. Introduce Teamwork Kit to Your Team

Time: 10 min. **Material:** A4 papers, colourful pens

Use the slides in the kit, or create your own. If the group isn't familiar with The Teamwork Kit, you plan some extra time to make sure they know why they're there. If you think (or know) there are some skeptics in the room, this is a good time to offer some compelling arguments. Chapter 4 of the Handbook is designed to help with those.

The activities are the backbone of the formula, but they aren't end states. Where the approach is most effective, the habits around trust and safety, active listening, and constructive feedback will have started filtering through team members' other work and relationships, and into the wider organisation. If some of the members have used it before, have the experienced participants say a few words about what it is and why you're doing it. Even invite some suggestions about how to make the process work in your particular team.

It can't be stressed enough that while being open and transparent is important that no one is expected to walk in ready to feel and express a sense of safety immediately.

This isn't just the foundation for your work, this is a session that helps you lay the groundwork for the trust and safety you'll be building together over time. It's important to tell the team this explicitly, so they'll be better able to accept whatever starting point they're at.

READ THE ROOM

People play a range of roles on teams. Read the room and try to determine where your cheerleaders and your doubters are. It can help to get cheerleaders a little more involved when energy is flagging, and use the times when you feel in 'flow' to start drawing the doubters out a little.

3. Work Group or Project History

Maybe you're all clear on why you're here, but does everyone know how we got here? Whether it's a project, a team, or a new company or division, it's valuable for each person to understand the background story.

What to do

Time: 20 min. **Material:** A4 papers, colourful pens

You can do this in one of three ways:

1. **Invite and speak** – Invite the person who initiated the project to speak to the group for 10 minutes. Make sure they're prepared and know what to say. Send them the questions above and leave it up to them. This method works best if the project initiator is already familiar with the toolkit, since they'll have a good understanding of what's needed and why.

2. **Interview** – Ask the project initiator to just show up and be interviewed. Give them an overview of what you're looking for, but make sure they know you'll guide them through what to say to the group. Use the questions above to help you.

3. **Make a presentation** – Using the guide questions, get the project initiator to pass the information to you in advance, and prepare a short presentation to the team.

YOUR TEAM NEEDS TO KNOW:

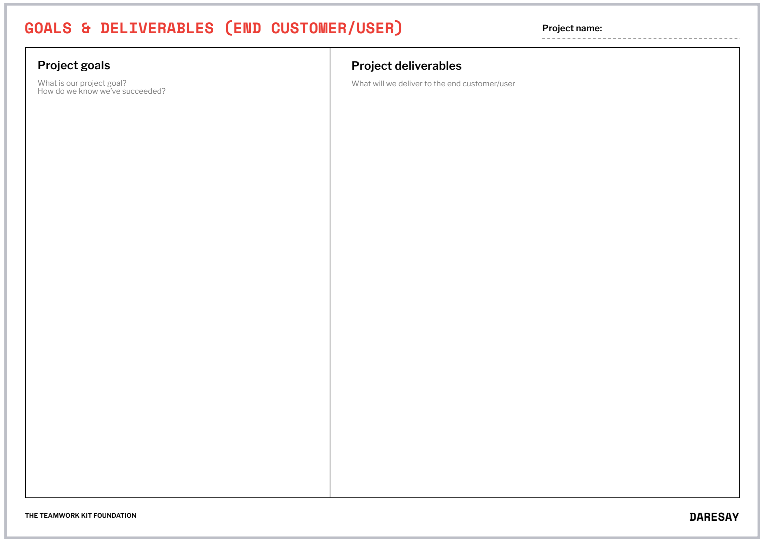
- ☑ **How did the work start?**
  What kinds of meetings, scoping sessions and sales processes have there been?
- ☑ **Who's involved?**
  What are some of the key internal and external relationships, and who has been part of the pre-project planning?
- ☑ **Why are we doing this work?**
  Which elements of this project allow the team to see where their work fits into their organisation's overall values?
- ☑ **What do you see?**
  Be as open as you can be about opportunities, glitches to date, and potential challenges.

4. Goals and Deliverables

What are your goals and what are the individual pieces of the project going to look like, for your end users and for your client? Even if you've done a project kickoff and you have a clear brief, this is a useful way to understand how each person sees the project, and to spot any gaps in the goals and value for the end user or the client. It will help you answer the question:

How do we know we've succeeded?

You'll be better at balancing the needs of the client with your advocacy for end users once you have all of these things in focus.



Goals and Deliverables poster

What to do

Time: 20 min.

Material: A4 papers, colourful pens

- You can print these out in A3 (or larger, if you have access to a large format printer), or you can do it on a whiteboard – just remember to document and save the results.
- Let participants know to use one idea per sticky note, so it's easier to move them around for clustering later.
- It's also possible to do the client-value section first, especially in a team that doesn't work closely with end users.
- If participants are struggling, use the sample posters, or seed the discussion with examples from previous projects in your organisation.
- Make sure everyone gets a chance to write some ideas down individually – this is one area where group brainstorming can produce less effective results.
- Encourage the team to be specific about the client and customer value.

THE TEAMWORK KIT

5. The Team Template and Team Map

Time: 30 min.   **Material:** A4 papers, colourful pens

Who are you? Where are you? How will you contribute and who will benefit? This is another area that often seems obvious but is rarely as clear as it can be. It's one of the most important pieces to talk about in a project, and helps everyone see their own and others' value, needs, and challenges before the work starts.

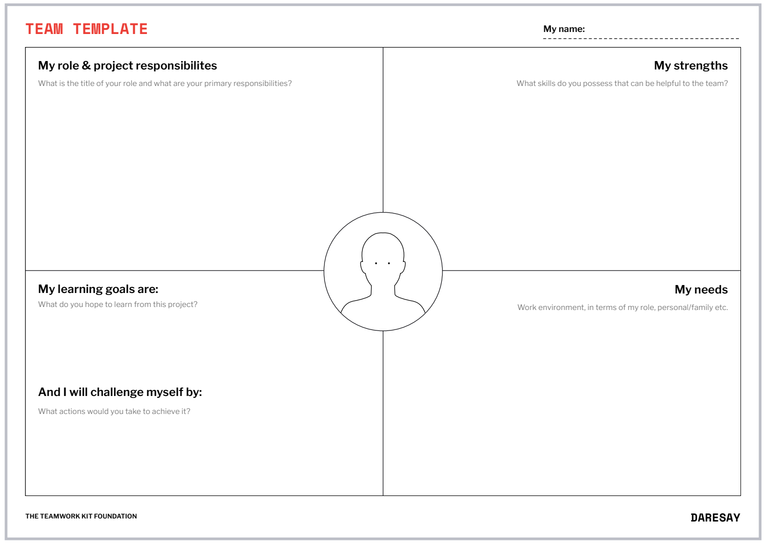
The Team Template

This isn't the polite, condensed holiday dinner version. The Team Template is the real, extended answer to *"What do you do all day?"* and it goes beyond just what's in your official job description. If there's a section not to shortcut, ever, it's this one, even if you all know each other already. You'll be surprised at what you learn about your teammates and about yourself, and, a few weeks from now, you'll be glad you have a real picture of what everyone is actually responsible for, capable of — and worried about. During times of stress or flagging energy, you'll be able to draw on people's strengths, tap into their development goals, or understand a need that isn't being met, without getting in the way of the project progress.

What to do

Give a good example. There's a sample in the Foundation deck, but you can also fill out your own and use it as an example to follow. People without experience of The Teamwork Kit will want to make sure they get it 'right', so it's important they understand how to do that.

Remind the team that their responsibilities, goals, and needs can be practical, skills-based items and culture goals. They should stay close to the project work, but when work is personal, those things will overlap.



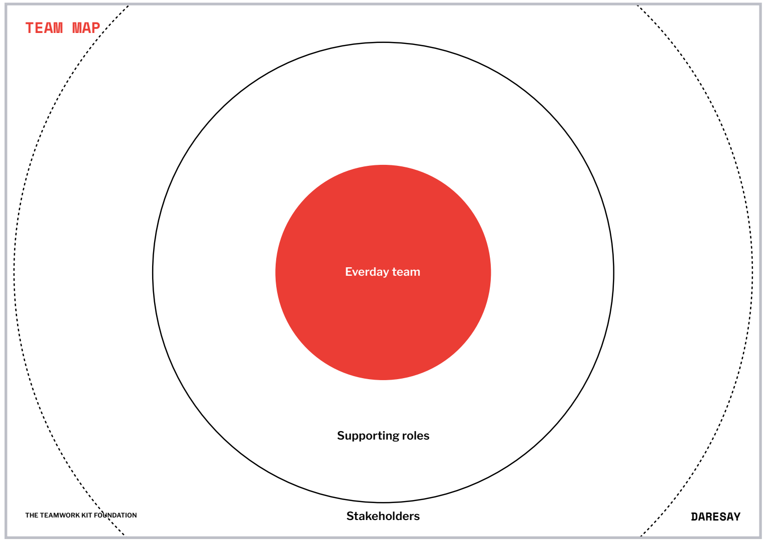
Team Template poster

THE TEAMWORK KIT

Don't rush people through their presentations of their templates. Especially give a little extra room to people who tend not to speak up, or who undersell themselves. Having the room focused on supporting and validating them as a person and colleague can be a useful early confidence boost.

When each person has presented, if think about whether anything is unclear.

Your role as a facilitator is to ask questions that help the team clarify things for themselves. Bring up any obvious impediments or confusion, such as overlapping responsibilities or needs that seem incompatible, and help them by guiding them toward a plan.



Team Map poster

The Team Map

Once you've established who is on your team and what you're all there to do, the team map will help everyone understand where this group is in the constellation of stakeholders, managers and clients. The purpose of this is to map out the 'everyday' team, including the supporting roles or people, including clients and stakeholders. The goal is to make it easy to find out where the points of contact are for each team.

It's common for the 'decider' role to be outside of the everyday team, so make sure it's clear who that is. It's important for the team to know who can influence their work in various ways and who they should contact for support if they need it.

All of this goes on the Team Map.

What to do

You can do the team map in advance of the session if you need to save time. Whether you actually draw it in advance or you plan to do it with the group, gather the knowledge you need beforehand. The team might be able to augment it, but you'll need to supply as much as you can.

Make sure you outline the everyday team (people who are 80–100% in the project, or whatever the maximum involvement is), the people in supporting roles (who have an interest and can influence the project, but are perhaps 50% involved), and the stakeholders (product owners, steering groups, external managers, and people who have some time, but not much—perhaps 20–30%)

Show the team the map and walk them through it. Who are each of these people? What are they responsible for, interested in, or in charge of? Where and how can you find them—and why might you? Should you ask or approach them directly, or are there protocols or communication chains to know about? How are they connected, to the team and to one another?

Leave some time and space for the team to ask questions and make observations. If team members have experience of navigating this particular internal structure, or one like it, see if they have any special insights that can help the group.

TIME CRUNCH

If you're tight on time, and especially if you have a team that has used this before, ask them to fill out their templates before the workshop. That way you can spend less time writing and more time talking about them with each other.

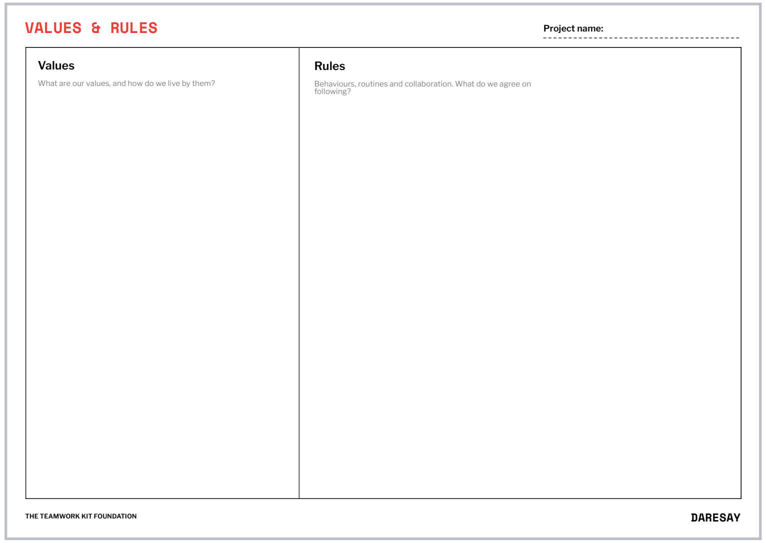
6. Work Culture

Time: 20 min. **Material:** A4 papers, colourful pens

Now that you know who you are and where you are, let's talk about why you're here. In this section, you'll connect the work to the larger organisational values, for yourselves individually and for the team as a group.

Team Values

Most of us work for organisations that have a stated set of values, and those values are probably written in a way that leaves room for interpretation. That can leave them feeling vague, but it also makes them easy to connect with emotionally and professionally, if we take the chance to see them as something more than some nice ideas on paper. But what if you could take some considered steps toward building them into your daily work? This is your opportunity to do that. You'll use these values, along with the Team Templates, to create your project rules. You'll add your own team values, so that everyone feels personally invested in the work.



The Value and Rules poster

What to do

- Collect up the organisation's values (your own, your client's, or a mixture of the two) and make sure you can present them to the team during the workshop.
- Seed the group with some examples from past projects, or use the ones in the sample templates.
- Make sure people have some time to work by themselves on this, creating both individual and collective examples.
- Get the team to describe some specific scenarios for putting those values into action. If you're familiar with user story creation, try using that format, so that it's clear to each person what it looks like, to themselves and each other. It's also a helpful way to visualise the successful application of values, and feel a little bit inspired.
- Once you've done this, cluster them and create a set of values, with how each can or will be applied.

Team Rules

These aren't rules imposed externally, or from above, these are made for your team, by your team, with the purpose building trust and accountability. They should support, validate, and facilitate a safe environment for all, rather than necessarily restrict anyone (unless the thing being restricted harms the team or its members). For this section, you'll use the "Needs" items on the Team Templates, so that your rules will help the team's individual members as well as the group, and the Values list you made just above, so that you can build your way forward with multiple factors in mind.

What to do

- Turn to the "needs" items on the Team Templates, and begin to turn those into rules and guidelines for the team in this project.

- If there is conflict between the rules (i.e., one person has written "no meetings before 10am" and another has written "all meetings early in the morning" as their needs), try sticker voting to determine a reasonable window that doesn't deny anyone's needs. If the conflict can't be resolved in this way, make room for discussion and consensus-building, and be sure to model active listening as that happens.

- Get the team to physically use the Team Templates, rather than a summarised list. It will help them remember that these needs belong to the people in the room, and encourage them to validate one another. Rules should benefit the group, but that also means acknowledging people's individual needs

POWER GRAB

Be aware of the power dynamics in the room here, especially where some team members might have power they aren't aware of, whether that's due to background, personality, seniority level or some other factor. For the group to truly own the rules they make, it's important that someone's individual power or advantage not be a factor in whether a rule is established. In other words, this is a time to pay special attention to the unconscious biases each of us has — including your own.

7. Plan Your Journey

Time: 10 min. **Material:** A4 papers, colourful pens

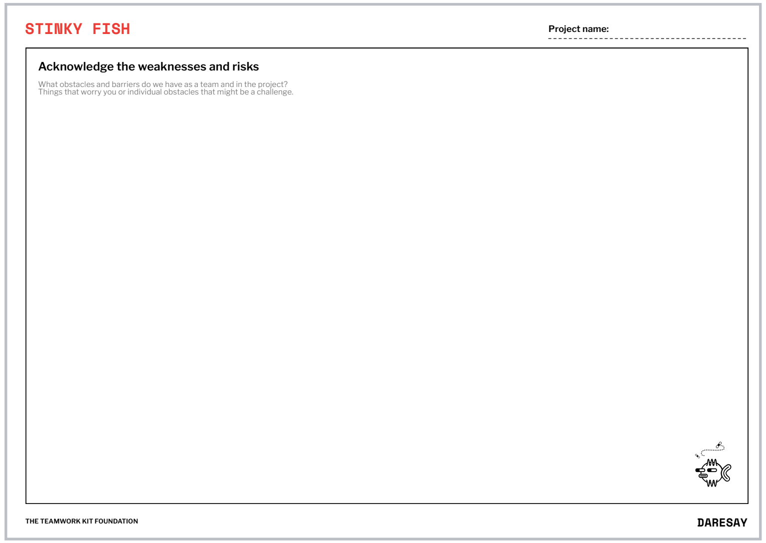
Now that you're all fired up, it's time to give the plan a chance to do the thing all plans do: fail at the first contact with reality. This final section is where you'll give space for concerns and issues, and then make a plan to get things done.

Stinky Fish

What obstacles and barriers do we have as a team and in the project? What are some things that worry you? Or are there individual obstacles that might be a challenge? This exercise comes from Hyper Island, who named it because a fish, left unattended, doesn't get less rotten. No matter how small it is, it's going to get worse the longer you leave it. Better to find out early than to spend time later trying to figure out where that smell is coming from.

What to do

- Make sure everyone sees a range of good examples of stinky fish, whether that's from the sample template, or from your own past projects or personal stash of worries.



Stinky Fish poster

- Let people work on this solo. Comparing notes during the sharing portion is a small but valuable bonding opportunity.
- Remind team members to write one stinky fish per stickynote, since you'll want to cluster them later.
- Once you start sharing, participants will almost always start looking for solutions right away. Remind them this is a chance to bring up issues that need to be addressed or that might come up later, not to solve them. If the solutions are simple enough, give them space to do that, but then redirect them to the purpose of the task.
- If everyone has a similar concern, or there's something potentially quite challenging, reassure the team that you can all discuss it separately. It can help alleviate some otherwise distracting anxieties about whether there will be time to talk about it later.

Project Timeline

Its time to put it all together. How will you put the routines into action, accounting for the shared rules, the concerns raised when you did the Stinky Fish and the values you want to apply? Now that you've raised the issues and challenges, how can you ensure that your plan and process can be integrated into your daily work, weekly meetings, and monthly targets? This is where you'll answer questions about whether you'll have Alignments as standalone sessions, for example, or if they can take the place of some of the regular project meetings.

- ☑ How will you recruit people for Popups, and who will be responsible?
- ☑ How often will you do a Feedback session, and when will you start?
- ☑ What known activities can you tie your new habits to, so you'll be more likely to do them?

What to do

▷ Book as many sessions as you can while everyone is still there, but not so many that people start to feel they can rearrange them later - it's important that no one see this part of the work as an optional extra. Talk together about how you'll map this to the overall project plan, if that's been made separately.

▷ If your organisation is the kind that's reluctant to make time to talk about ways of working, or sees it as a "fluffy" and therefore somehow less valuable task, make sure you find ways to integrate work into standard meetings, workshops and time-frames.

Project Timeline poster

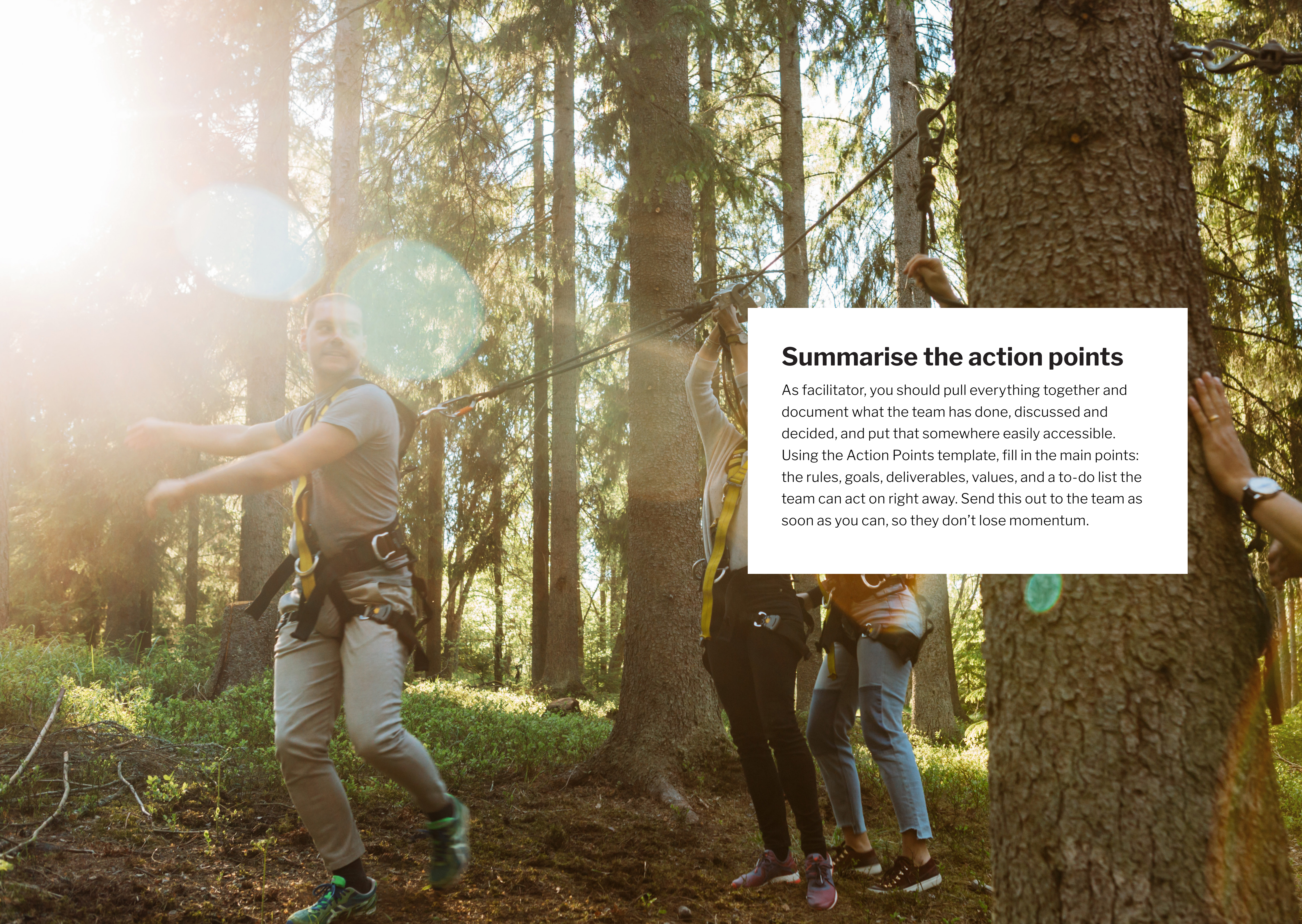
▷ Plan for reality, not ideal worlds. Once an organisation sees the team demonstrate the benefits of The Teamwork Kit, they may be more interested in opening up the time for it, but it's okay to tweak and adapt things in order to get there.

▷ Show examples from past projects and the sample projects, so the team understands how to suggest or plan activities and times.

▷ Pick some fun milestones to look forward to and talk about how they will be. Helping each other visualise the journey will make it more relatable and inspiring.

Team Fun

Nothing is as exciting as enforced fun, right? But seriously, this is valuable, and doesn't have to feel forced. It's just nice to finish on a high note. If you're doing this before lunch, just have lunch together. If you're already short on time, do a brief energiser or team bonding exercise just to close things off. It's probably been an intense session, so you want people to feel a sense of shared completion and success.



Summarise the action points

As facilitator, you should pull everything together and document what the team has done, discussed and decided, and put that somewhere easily accessible. Using the Action Points template, fill in the main points: the rules, goals, deliverables, values, and a to-do list the team can act on right away. Send this out to the team as soon as you can, so they don't lose momentum.